

How to Apply for the Designed to Earn the ENERGY STAR® Recognition

Architects and building owners can reduce their carbon footprints and energy costs by designing buildings that achieve ENERGY STAR. These buildings are designed to perform in the top 25 percent of similar buildings nationwide. This document provides instructions on how to apply for Designed to Earn the ENERGY STAR Recognition for commercial and multifamily high rise new construction projects.

What is Designed to Earn the ENERGY STAR?

Designed to Earn the ENERGY STAR is awarded to eligible commercial and multifamily high rise new construction properties that are in the design or construction phase and the estimated total annual energy use achieves an ENERGY STAR design score of 75 or higher. Commercial and multifamily new construction projects can display the recognition graphic, *Fig. 1* on design plans and promotional materials for the specified project.



Fig. 1 – Designed to Earn the ENERGY STAR Recognition Graphic

Eligibility Criteria for New Construction Projects

- Meet EPA requirements for Commercial projects, see Appendix A, or Multifamily high rise (MFHR) projects, see Appendix B.
- ✓ Receive an ENERGY STAR 1 100 score of 75 or higher.
- Create and save project in Portfolio Manager.

Application Process Overview

- Enter the new construction property in Portfolio Manager and:
 - Completes the Statement of Energy Design Intent
 - Optionally, completes and submits a case study to be posted on the ENERGY STAR website.
- 2. Submit application documents to EPA.
- 3. EPA notifies applicant by email of the application status.

Eligible Property Types

- ✓ Bank Branch
- Courthouse
- ✓ Data Center
- ✓ Distribution Center
- Financial Office
- Hospital (General Medical & Surgical)
- ✓ Hotel
- ✓ K-12 School
- Multifamily High Rise
- Non-Refrigerated Warehouse
- Office
- Refrigerated Warehouse
- Retail Store
- Senior Living Community
- ✓ Supermarket/Grocery Store
- Wholesale Club/ Supercenter
- Worship Facility



Entering your New Construction Project in Portfolio Manager for Designed to Earn the ENERGY STAR Recognition

Use Portfolio Manager to generate an ENERGY STAR 1-100 score for the estimated energy use of the project. Start by **creating an account or login** to Portfolio Manager to complete the application for Designed to Earn the ENERGY STAR Recognition.

NOTE: If you are using Target Finder, skip MyPortfolio – Add a Property, instead start on About Your Design Project screen in Target Finder, *Fig. 4*. You will be required to complete My Portfolio section when the property is saved to Portfolio Manager.

Properties (39) Add a Property ENERGY STAR® Portfolio Manager® Recognition Dashboard It has been over current metrics.

Fig. 2 – Add a Property

Add a Design Property in Portfolio Manager

EPA recommends setting up the design project in the building owner's or property developer's Portfolio Manager account.

The owner can then **share** the project with the licensed professional (LP) tasked with creating the Recognition application. Learn **How to Share Properties with Other Portfolio Manager Users**

Conversely, if the LP creates the design project in their Portfolio Manager account, the record should be *transferred* to the owner's account once EPA approves the project for Designed to Earn ENERGY STAR Recognition. See How Do I Transfer
Properties to Another User?

NOTE: The record in Portfolio Manager should be associated with the owner's account who will be able share the record with necessary parties and use the same record later on to track energy use of the operating property.

Start on MyPortfolio tab, click Add a Property, Fig. 2 to open Set up a Property page, Fig. 3. Complete information about your design project in the following sections:

- Your Property Type: Select property's primary function, ex. Office, K-12 school.
- Your Property's Buildings: Indicate whether the property is a single building or contains multiple buildings.
- Your Property's Construction Status:
 Select the Design Project radio button.
- Click Get Started! and continue on Set Up a Design Project screen.

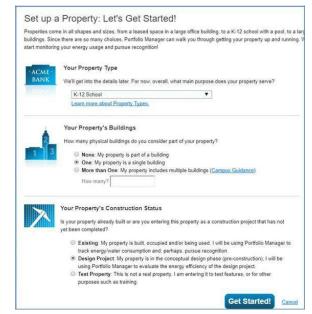


Fig. 3 – Set up a Property

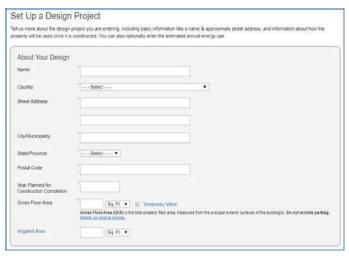


Fig. 4 – Set Up a Design Project

Set Up a Design Project

Complete the next four sections about your project:

 About Your Design: Enter property name, address, year planned for construction completion and gross floor area,

Fig. 4.

Property Use Details: Complete
the property use details for the
primary function you selected. If
your project has multiple functions,
select Add Another Type of Use
from drop-down menu and complete
the requested information, Fig. 5.

NOTE: Be sure that the total square footage of all property functions equals the total gross floor area you entered on the previous screen **About Your Design**.

NOTE: Applications with default values will not be accepted for Designed to Earn the ENERGY STAR Recognition.

 Estimated Design Energy: This information is required to calculate an ENERGY STAR design score for your estimated energy use.

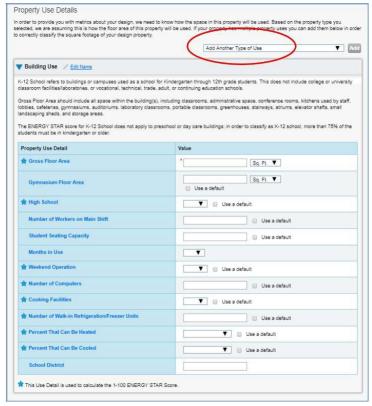


Fig. 5 – Adding another type of use

- Click the Energy Type radio button and enter information for the tool to calculate your
 Design results: Fig. 6
- Select Energy Types for all energy types, including renewable sources that willbe consumed at the property.

NOTE: Electricity must be included as an energy type.

- Enter Units of measure
- Enter Estimated Total Annual Energy Use for all fuel types. Include energy intended for systems, process and connect loads associated with operating the building.
- Enter Energy Rates. If you do not know the energy rate the tool will calculate costs using the state average cost for each fuel type:



Fig. 6 - Energy Type

average cost for each fuel type; except for renewables user must enter rate.

- Choose either Target ENERGY STAR Score or Target % Better than Median, Fig. 7 to select an energy performance target for your design.
- Click "Create Design" in Portfolio Manager to view results in the "Design" tab, Fig. 8.

NOTE: If you are using Target Finder select "**View Results**" to view Design results screen. You will be able to save the project to



Fig. 7 - Target

Portfolio Manager and view it in the "Design" tab and complete the Designed to Earn the ENERGY STAR Recognition application.

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Completing your Designed to Earn the ENERGY STAR Application in Portfolio Manager

Your Design Score will appear if your project meets EPA criteria to receive an ENERGY STAR score. If the score is 75 or higher and the **Apply for Designed to Earn the ENERGY STAR Recognition** link appears, *Fig. 8,* your project is eligible for recognition.

NOTE: If you receive "N/A" in the design score box, go to About this Property's Design box, click Edit and review all entries and make necessary changes.

- Click the link Apply for Designed to Earn the ENERGY STAR Recognition, Fig 8, beneath the score to open the Application screen and complete the following sections:
 - About Your Design: Enter the Estimated Date of Certification of Occupancy
 - Contact Information for You
 Design: Select contacts from the
 dropdown menu, Fig. 9 to pre populate information on the
 Statement of Energy Design Intent
 form.

NOTE: To select a property owner or LP contact that's not listed in the drop-down menu, you can add additional contacts. Click the "**Contacts**" link in the upper right-hand corner on the screen and add new contacts.

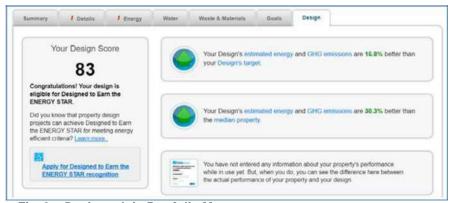


Fig. 8 – Design tab in Portfolio Manager

NOTE: If your score is 75 or higher, but the **Apply for...Recognition** link does not appear, review information

you entered in **About this Property's Design** and ensure that no default values have been selected. Click **Edit** to make changes.

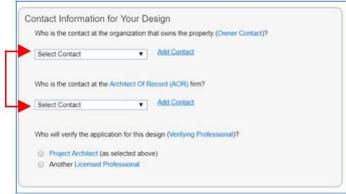


Fig. 9 – Contacts dropdown boxes

- 2. Your Application Process (not shown) provides a list of steps required to complete your application.
 - In this section, you can download and create a **Design Profile** (which is optional) andwrite a
 case study about your project and be recognized on the ENERGY STAR website. Save the
 Profile as a Word or similar format with file name: "Profile_[Project Name]" and submit it
 with your application.
- Designed to Earn the ENERGY STAR Application Checklist: (Not shown in this
 document.) Answer all questions on the Checklist to confirm that your application meets
 all requirements.
- 4. Generate Your Application for Signatures
 - Click Generate and Download your Statement of Energy Design Intent (SEDI) for Signatures, Fig. 10. Print and save the SEDI to your computer.

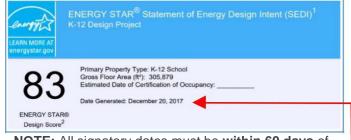
NOTE: When you exit the SEDI page, the "date generated" by Portfolio Manager, your answers to the Checklist questions and contact information for AOR/owner fields will not be saved.



Fig. 10 – Download Statement of Energy Design Intent

Preparing your Designed to Earn the ENERGY STAR Application to Submit to EPA

- Ensure all requirements are met for your new construction project:
 - For Commercial properties, see Appendix A
 - For Multifamily High Rise properties, see Appendix B



NOTE: All signatory dates must be **within 60 days** of the SEDI date generated by Portfolio Manager to be eligible for Designed to Earn the ENERGY STAR Recognition.

- Scan the completed SEDI form, Fig. 11, to apply for Designed to Earn the ENERGY STAR Recognition
 - Save the SEDI as a PDF with the file name: "SEDI_ [Project Name]".
 - Attach the SEDI (required) and Design Profile (optional) files to email.

NOTE: For your specific property type, follow instructions in Appendix A or Appendix B.

- Write in email subject line "DEES Application".
- Send the application to: <u>DEES@energystar.gov</u>
- Questions about your application, send an email to <u>DEES@energystar.gov</u>
- If a response is not received within 10 business days, please contact our help desk

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3. The Architect of Record (AOR) firm is invited to join the ENERGY STAR Partnership

(which is optional).

- EPA extends this opportunity to all AOR firms for achieving Designed to Earn the ENERGY STAR Recognition.
- Once EPA has approved the project application, these firms cantake advantage of the benefits of being an ENERGY STAR partner. Benefits of the partnership includeaccess to the My ENERGY STAR Account (MESA) portal, where firms can download exclusive partnership logos to enhance theirmarketing materials.
- Learn more and access the
 Partner Agreement for Service
 and Product Providers
 and click on
 Commercial New
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Notifying Applicants about Designed to Earn the ENERGY STAR Recognition Status

EPA or EPA recognized organization reviews applications and notifies the applicant of status; for projects that are approved for ENERGY STAR Recognition, the applicant will:

- 1. Receive instructions to download the Designed to Earn the ENERGY STAR Recognition graphic, Fig. 11. If your organization is an ENERGY STAR partner, you may download the Design to Earn the ENERGY STAR Recognition graphic directly from the online MESA portal. If your organization is not a partner, the DEES review team will send you the Design to Earn the ENERGY STAR Recognition Graphic via email. The graphic mark may be displayed on drawings and promotional materials for the specified design project. See guidelines for Using Designed to Earn Mark Commercial & Multifamily, Fig. 12.
- Have their Design Profile (if applicable) linked with project listed on the <u>Projects</u> and Architects that Achieved <u>Designed to Earn the ENERGY STAR</u> webpage.
- 3. Be encouraged to promote your Designed to Earn the ENERGY STAR recognized project in marketing materials, on your company website and through social media. Learn more on why you should design to earn the ENERGY STAR.



Fig, 12 – Designed to Earn Mark for Commercial & Multifamily New Construction

Appendix A: Project Requirements for Commercial New Construction Properties

Applicant Requirements

- ✓ The Architect of Record (AOR) is responsible for submitting the Designed to Earn the ENERGY STAR application to EPA.
- ✓ AOR completes information and secure signatures on the Statement of Energy Design Intent from the:
 - **Verifying Professional:** Registered Architect or Professional Engineer verifies all information on the SEDI and stamps, signs and dates the form.
 - Architect of Record: Project Architect or Principal of the AOR firm.
 - Building Owner/Developer: C-Level executive
- ✓ The property owner/developer is responsible for creating and maintaining the project record in their Portfolio Manager account and *sharing* the record with the AOR to apply for Recognition.
- Conversely, if the AOR creates the design project in their Portfolio Manager account, the record should be *transferred* to the owner's account once EPA approves the project for Designed to Earn ENERGY STAR Recognition.

General Requirements

- ✓ The project is located in the United States or U.S. Territory, or is owned by the U.S. Government.
- ✓ The design project is for an entire property and not a portion thereof (e.g., individual tenant space).
- √ The design project meets the eligibility criteria to receive the 1-100 ENERGY STAR score, and inputs for property use details meet the minimum requirements for the specific property type. See Eligibility criteria for the 1-100 ENERGY STAR score.
- The estimated energy use includes all fuel types and all energy associated with operating the building.
- ✓ The project is saved in Portfolio Manager does not include any default values for the property use details.
- ✓ The project earns an ENERGY STAR design score of 75 or higher.

Timeframe to Apply

- ✓ The AOR submits the Designed to Earn the ENERGY STAR application to EPA within 60 days of the date generated on the SEDI.
- ✓ The Construction Documents are at least 95% completed for the design project, except for "core and shell" projects.
- Designed to Earn the ENERGY STAR applications may be submitted during the construction phase of the project.
- ✓ Newly constructed buildings that are occupied and generating utility bills are not eligible for Designed to Earn the ENERGY STAR.

Appendix A: Project Requirements for Commercial New Construction Properties

Core and Shell Projects

Core and shell projects for a commercial real estate developed property are eligible for Designed to Earn the ENERGY STAR. The estimated energy use calculations for the anticipated building function are entered into Portfolio Manager.

Renovations, Additions, and Upgrades

- ✓ Major renovations, defined as encompassing 50% or more of the gross square feet of the existing property are eligible for Designed to Earn the ENERGY STAR. The project scope should include significant design and construction activities such as HVAC, envelope, and interior modifications, etc.
- ✓ Major additions, defined as increasing the gross square feet of an existing property by 50% or more are eligible for Designed to Earn the ENERGY STAR.
- ✓ Hospital additions are not eligible for Designed to Earn the ENERGY STAR.
- ✓ Major equipment or system retrofits or upgrades for an existing property are not eligible for Designed to Earn the ENERGY STAR. If the project scope focuses more on operational and maintenance activities, these properties may be eligible for ENERGY STAR certification for existing buildings.

Appendix B: Project Requirements for Multifamily High Rise New Construction Properties

Applicant must complete all application documents and meet all requirements to be eligible for Designed to Earn the ENERGY STAR Recognition.

Document Requirements

- ✓ Complete the ENERGY STAR MFHR Developer Partnership Agreement
- √ Submit the MFHR Project Application
- ✓ Provide a <u>Proposed Design Submittal</u> to include the following documents:
 - Proposed Design Performance
 Path Calculator
 - Testing & Verification Worksheets
 - Statement of Energy Design Intent generated from Portfolio Manager.

MFHR Application Resources

MFHR Eligibility Requirements:

www.energystar.gov/mfhr/eligibility

MFHR Program information

www.energystar.gov/mfhr

MFHR Project Application and Proposed Design Submittal:

www.energystar.gov/mfhr/lp

EPA-recognized organizations MFHR Review Organizations

NOTE: Completing the Application Checklist is optional, please make sure that requirements for questions 1- 4 and 6 are met.

ENERGY STAR MFHR Submittal Validation Form

NOTE: MFHR property developer/building owner submits the application for Designed to Earn the ENERGY STAR Recognition to an EPA-recognized MFHR Review Organizations (MRO) for review and approval. The MRO may also allow developers/owners to work with professionals with varying credentials to provide the program submittals. Contact your MRO for more information.

Applicant Requirements

- ✓ The property developer or building owner designee; licensed professional (LP) applicant is responsible for submitting the Designed to Earn the ENERGY STAR application to EPA recognized organization.
- ✓ The property owner/developer is responsible for creating and maintaining the project record in its Portfolio Manager account and *sharing* the record with other parties as necessary to apply for Recognition.
- Conversely, if the LP creates the design project in its Portfolio Manager account, the record should be *transferred* to the owner's account once EPA approves the project for Designed to Earn ENERGY STAR Recognition.

General Requirements

- ✓ The project is located in the United States or U.S. Territory, or is owned by the U.S. Government.
- ✓ The design project is for an entire property and not a portion thereof (e.g., individual tenant space).
- ✓ The energy calculations for the project account for all intended energy use for operating the entire property, including renewable and all other anticipated fuel and energy types.
- √ The design project meets the eligibility criteria to receive the 1-100 ENERGY STAR score, and inputs for property use details meet the minimum requirements for the specific property type. See Eligibility criteria for the 1-100 ENERGY STAR score.

Appendix B: Project Requirements for Multifamily High Rise New Construction Properties

- ✓ The project saved in Portfolio Manager does not include any default values for the property use details.
- ✓ The project receives an ENERGY STAR design score of 75 or higher.
- ✓ Individual units in Multifamily High Rise Properties are eligible for ENERGY STAR certification once the property is built and verified to meet EPA criteria. For more information, visit www.energystar.gov/mfhr

MFHR Property Requirements

- ✓ The primary use of the building must be for residential purpose, i.e. the residential and residential associated common area must occupy more than 50% of the building's occupiable¹ square footage. A garage is not considered 'occupiable' space. Common area includes any spaces within the building that serves a function in support of the residential part of the building that is not part of a dwelling unit. This includes spaces used by residents, such as corridors, stairs, lobbies, laundry rooms, exercise rooms, and residential recreation rooms. This also includes offices used by building management, administration or maintenance and all special use areas located in the building to serve and support the residents such as day-care facilities, gymnasiums, dining halls, etc.
- ✓ Properties are 4 6 stories or above.

NOTE: Any above-grade story with 20% or more occupiable space, including commercial space, shall be counted towards the total number of stories for the purpose of determining eligibility. An above-grade story is one for which more than half of the gross surface area of the exterior walls is above-grade.

Per ASHRAE 62.2-2010, occupiable space is any enclosed space inside the pressure boundary and intended for human activities or continual human occupancy, including, but not limited to, areas used for living, sleeping, dining, and cooking, toilets, closets, halls, storage and utility areas, and laundry areas.

√ The project must be designed to be 15% more energy efficient than a baseline specified to meet ASHRAE Standard 90.1 or applicable energy code and meet program prerequisites, see www.energystar.gov/mfhr/requirements

NOTE: Use the EPA ENERGY STAR Multifamily New Construction Program Decision Tree to determine if your project is eligible under the ENERGY STAR commercial buildings or residential program, see *Fig. 13*.

Timeframe to Apply

- ✓ The property developer or building owner submits the Designed to Earn the ENERGY STAR application to EPA recognized organization within 60 days of the date on the SEDI generated by Portfolio Manager.
- ✓ The Construction Documents are at least 95% completed for the design project.
- Designed to Earn the ENERGY STAR applications may be submitted during the construction phase of the project.
- ✓ Newly constructed buildings that are occupied and generating utility bills are not eligible for Designed to Earn the ENERGY STAR Recognition.

Renovations, Additions, and Upgrades

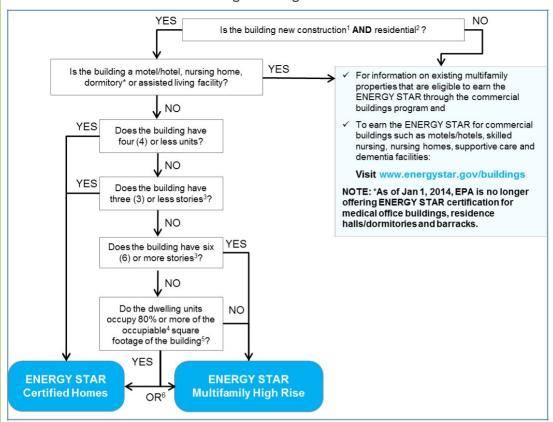
✓ Major renovations defined as a complete overhaul of the property encompassing the majority of the gross square feet of the existing property are eligible for Designed to Earn

Appendix B: Project Requirements for Multifamily High Rise New Construction Properties

the ENERGY STAR. The project scope should include significant design and construction activities such as HVAC, envelope, and interior modifications, etc.

NOTE: New construction can include significant or major rehabilitations when defined as a change of use, reconstruction of a vacant structure, or when construction work requires that the building be out of service for at least 30 consecutive days.

Major equipment or system retrofits or upgrades for an existing property are not eligible for Designed to Earn the ENERGY STAR. If the project scope focuses more on operational and maintenance activities, these properties may be eligible for ENERGY STAR certification for existing buildings.



NOTES

- 1. New construction can include significant gut rehabilitations when defined as a change of use, reconstruction of a vacant structure, or when construction work requires that the building be out of service for at least 30 consecutive days.
- 2. The primary use of the building must be for residential purposes, i.e. the residential and residential associated common area must occupy more than 50% of the building's occupiable square footage. A garage is not considered an 'occupiable' space. Common area includes any spaces within the building that serves a function in support of the residential part of the building that is not part of a dwelling unit. This includes spaces used by residents, such as corridors, stairs, lobbies, laundry rooms, exercise rooms, and residential recreation rooms. This also includes offices used by building management, administration or maintenance and all special use areas located in the building to serve and support the residents such as day-care facilities, gyms, dining halls, etc.
- 3. Any above-grade story with 20% or more occupiable space, including commercial space, shall be counted towards the total number of stories for the purpose of determining eligibility. An above-grade story is one for which more than half of the gross surface area of the exterior walls is above-grade.
- 4. per ASHRAE 62.2-2010, occupiable space is any enclosed space inside the pressure boundary and intended for human activities or continual human occupancy, including, but not limited to, areas used for living, sleeping, dining, and cooking, toilets, closets, halls, storage and utility areas, and laundry areas.
- 5. For mixed-use buildings, exclude the retail/commercial area when determining the square footage of the "building."
- 6. The ENERGY STAR Commercial Building or Residential certification program may be used for this building type. For a project with a central heating, cooling, or hot water system where applicant chooses ENERGY STAR Certified Homes, using *RESNET Guidelines for Multifamily Energy Ratings* for modeling the specific central system(s) is recommended.

Fig. 13 – EPA ENERGY STAR Multifamily New Construction Program Decision Tree, Version 1.3, updated February 21, 2017